

General Navigation

This guide provides you with an overview of how to navigate through ProcureAZ as a logged-in non-administrative user. A more thorough overview of how to navigate through ProcureAZ is provided in both the **Basic Navigation** and **Advanced Navigation** training courses.

Selecting a Role

Once logged in, your Homepage will display. Depending upon the role you are currently in, your Homepage will appear differently. You are also limited to your current role's access and function privileges. Therefore, the first place you should look when you login is the role tabs along the top right of the screen to ensure that you are in a role that has access to the functions you would like to utilize. If you have been given only one role, then no role tabs will appear.



Header & Navigation Bars

Also above your Homepage are the Header and Navigation Bars. These two horizontal bars are always present on the screen while you are logged in. They contain a series of links, icons and dropdowns enabling the user to access various types of information and documents within the system. The Header Bar also displays the official clock of the system. This date and time is used when time stamping documents and approvals, as well as managing solicitation available and opening times.









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Selecting a link or icon from these bars will take you elsewhere in the application. This includes while you are working on a particular document. Therefore, it is important that you save any work before selecting any of these links or icons. The tables below describe each link and icon, what functions they support and which roles can view them.



Link	Description	Visible to
NIGP Code Browse	Browse through the NIGP Code by category or search for specific codes by keyword.	• All roles
My Account	View and edit the contact and login information associated with your account within ProcureAZ.	• All roles
Customer Service	Input a customer service issue and send it via email.	• All roles
About	View technical information about the version of ProcureAZ that is currently being used.	• All roles



Icon	Name	Description	Visible to
	Advanced Search	Find any accessible document by various criteria.	• Department Access • Basic Purchasing • Inquiry
	Help	Open a help manual for the role currently selected.	• All roles
	Administrative Reports	Choose from and run preset reports configured to be accessible by your current role.	• Department Access • Basic Purchasing • Inquiry
	Dashboard	Browse your documents by type and status from the last 180 days.	• Department Access • Basic Purchasing
	G2B Punchout	Start a requisition for on-contract items that will route you to an external vendor website.	• Department Access • Basic Purchasing
	Logout	Logs you out of ProcureAZ.	• All roles

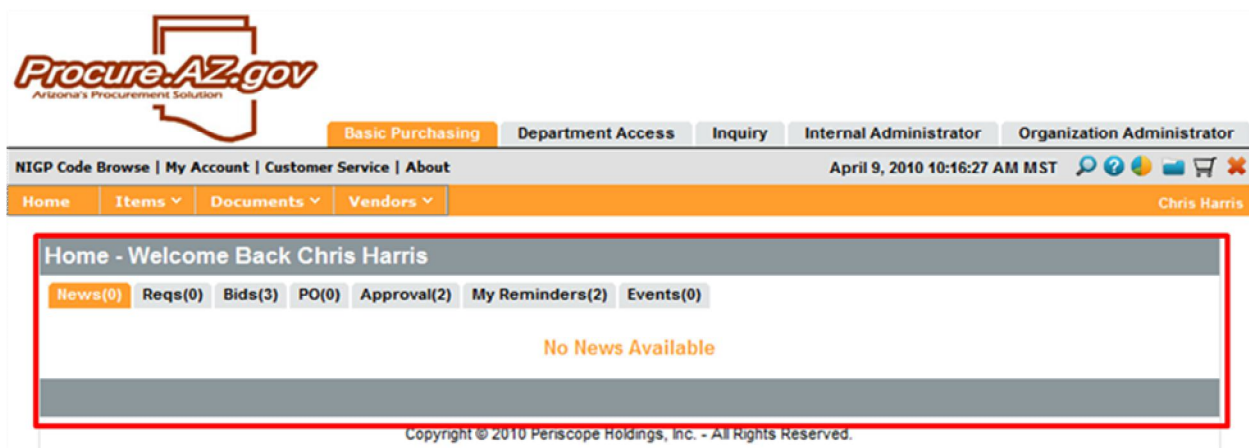


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Link	Description	Visible to
Home	Return to the Homepage screen, which appears when you initially login.	• All roles
Items	Browse through the categories of on-contract items. Selecting a specific NIGP Class within a category will display a list of on-contract items matching that class and enable you to add them to a new or existing Requisition.	• Department Access • Basic Purchasing
Documents	Select a document type and "New" to create a new document of that type. Select a document type and status to view all of your matching documents. While looking at a list of a specific document type and status, select "View All" to view all of the matching documents for your Organization.	• Department Access • Basic Purchasing • Inquiry
Vendors	Either select NIGP Codes to view the vendors registered for that code, or search for vendors and send them a bulk email.	• Department Access • Basic Purchasing

Homepage

For non-administrative users, your Homepage consists of the area below the **Home – Welcome Back (Your Name)** label and features a series of tabs. Depending upon the role you are currently in, your Homepage will feature different tabs. Each tab provides links to the most recent items and documents that may require your action. The number in parentheses within each tab is the total number of items within that tab that may require action.

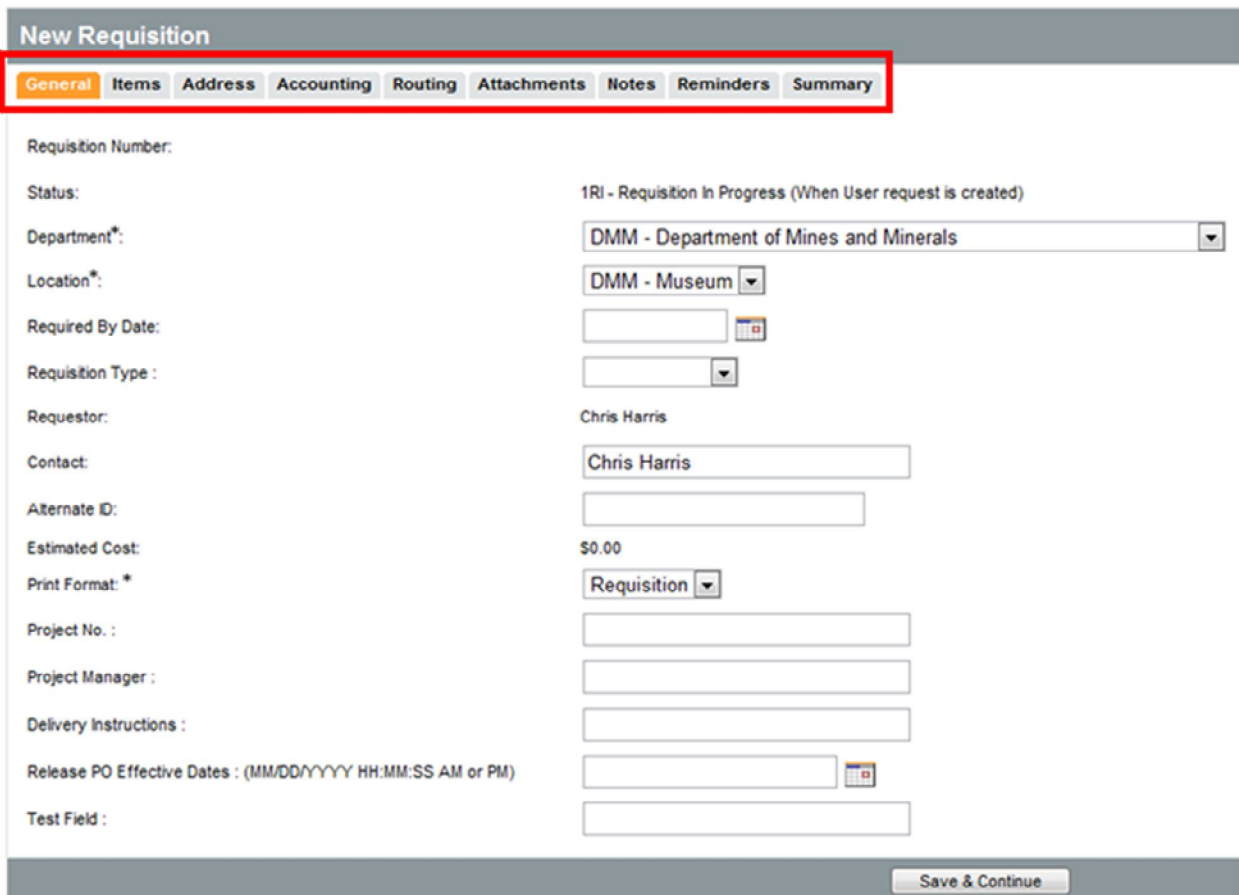


Document Navigation

All documents within ProcureAZ are organized in a similar fashion. Information on documents is input and accessed via a series of tabs along the top of the document. As information is input or edited on a tab, you must click **Save & Continue** on the bottom of the tab before proceeding to the next tab or navigating elsewhere in the system.

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When starting a new document, you will start on the **General** tab, which is the far left tab. You will then need to complete any required fields on this tab before saving and moving to the next tab. Required fields are marked with an asterisk.



New Requisition

General | Items | Address | Accounting | Routing | Attachments | Notes | Reminders | Summary

Requisition Number: _____

Status: 1RI - Requisition In Progress (When User request is created)

Department*: DMM - Department of Mines and Minerals

Location*: DMM - Museum

Required By Date: _____

Requisition Type: _____

Requestor: Chris Harris

Contact: Chris Harris

Alternate ID: _____

Estimated Cost: \$0.00

Print Format*: Requisition

Project No.: _____

Project Manager: _____

Delivery Instructions: _____

Release PO Effective Dates: (MM/DD/YYYY HH:MM:SS AM or PM) _____

Test Field: _____

Save & Continue

Whenever you access a previously created document, you'll initially be taken to the far right tab, the **Summary** tab. This tab displays all the information that was entered for the document on the previous tabs, and contains options along the bottom that, depending on the status, allow you to perform certain actions against the document, including Clone, Cancel, Submit for Approval, Approve/Disapprove, Send and Print.

General Navigation

Open Market Requisition ADSP010-00000452

Status: 1RI - In Progress



General Items Vendors Address Accounting Routing Attachments Notes Reminders **Summary**

Overall Validation Warnings

- Item # 1: No vendor, and there is no recommended vendor at header level.

Header Information

Requisition Number:	ADSP010-00000452	Short Description:	Laptop	Status:	1RI - In Progress
Organization:	State Procurement Office	Location:	DMM - Museum	Required By Date:	
Department:	DMM - Department of Mines and Minerals	Requisition Type:	Open Market	Type Code:	
Entered Date:	04/28/2010	Purchaser:	Chris Harris	Fiscal Year:	2010
Requestor:	Chris Harris	Contact Phone:	(555)555-5555	Alternate ID:	
Contact:	Chris Harris	Print Format:	Requisition		
Estimated Cost:	\$800.00	Bill-to Address:	State Procurement Office 100 N 15th Ave. Suite 104 Phoenix, AZ 85007 US Email: test@goperiscope.com Phone: (602)542-5511		
Ship-to Address:	State Procurement Office 100 N 15th Ave. Suite 104 Phoenix, AZ 85007 US Email: test@goperiscope.com Phone: (602)542-5511				

Item Information

Item # 1 : Laptop computer

1RI - In Progress

NIGP Code: 204-54
Microcomputers, Handheld, Laptop, and Notebook

Qty	Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0	\$800.00	\$800.00	EA - Each	\$0.00		\$0.00	\$800.00

Manufacturer: Brand: Model:
Make: Packaging:

Account Code	Amount
There is no item accounting available for this item.	

Submit for Approval

Cancel Requisition

Clone Requisition

Print

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